INDIANA UNIVERSITY
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IPFW IBM Cognos Connection User's Guide

Cognos Version 11.0.7

November 2017

Business Intelligence Competency Center

INFORMATION TECHNOLOGY AT PURDUE

References and text in this manual have been provided with permission by Purdue University, West Lafayette, Indiana. Some changes have been made to meet the needs of Cognos users at IPFW.

Table of Contents

How to Use this Manual

This manual is designed to meet the needs of consumers and report authors working with the Banner Student data. The format offers information about Cognos that is applicable to all users. Efforts have been made to organize the content in a way that will make it easy to use regardless of your business need.

Screen shots may differ slightly from your view of the same forms in Cognos.

Exercises

The instructions are written as generally as possible. We will mostly use the shared reports open to all Cognos users at IPFW as examples.

Quick Tips

Quick tips will be included at times when information may be needed at a quick glance as you use Cognos. The tips are located on the right side of the page close to the paragraph with the information you need. It will be in the format you see on this page.

Manual exercise references may vary from pictured items in this manual. The exercises are still relevant and will help you learn the tool.

Important Information

Occasionally important information pertains to a set group. When that occurs, it will be included in a box like this one which contain information for student report authors.

Student Report Authors

Beginning in Spring 2009 use Cognos against the ODS.

Introduction

Cognos is a web-based reporting solution that allows data consumers to create and run reports. The focus of this manual is running reports. The IPFW Cognos licensing consists of the following components:

- IBM Cognos Connection – used to run reports
- IBM Cognos Report Studio - managed reports creation tool

Licensing Information

Cognos is a suite of applications that requires a license for each user. Licenses are tiered so that access to tools is limited to meet individual needs. The license you receive is based on the role(s) you have been assigned. Most users are only Consumers. Report Authors are located across campus have been identified and assigned the report authoring licenses. Your trainer can answer questions on who to contact regarding existing reports and new report requests.

Report Author Licensing	Consumer Licensing
• IBM Cognos Connection • IBM Cognos Report Studio	• IBM Cognos Connection

If you have any questions regarding licensing, please contact Ashley Wiesemann at wiesemaa@ipfw.edu for more information.

Consuming Reports

Consumers use IBM Cognos Analytics to run pre-written reports. You can subscribe, schedule, view, download, or print report output information based on the report logic. The results can be exported into these formats:

- Excel 2007 Format
- Excel 2007 Data
- csv (for mail merge or import into other systems)
- Adobe Acrobat (.pdf) for printing
- Web based HTML format for viewing

Banner student data for Cognos reports usually comes from one of two sources. Most of the reports in Cognos will display which data source is referenced in the title and in the header of the report output, (PROD) or (ODS).

Banner PROD	ODS (Operational Data Store)
• **The data in the reports comes from Banner Production and is live and up to the minute.** • **Reports take longer to process.**	• **Data is refreshed nightly so report results are based on the previous day's activities/changes.** • **Most all new reports are written to use ODS data.**

Communication

Communication of information will be available should there be a time that will affect your use of Cognos. Typically the communication goes through the Cognos Listserv. Therefore, all Cognos users are added to the Cognos listserv. This allows us to notify you of system outages, new reports available for use, or to share timely tips and tricks.

If you have any questions regarding the listserv and its uses, please ask your trainer.

Security

Keeping data safe and secure is now a part of Indiana law. Cognos is designed as a secure environment for viewing data. If data must be extracted, take proper precautions to secure it. **DO NOT save sensitive data on your PC (usually C: drive)**. **IF you must save the output, be sure to save it to a LAN drive or other secured location.**

Review the link below for protection of data and for your own safety.

Data Classification Requirements

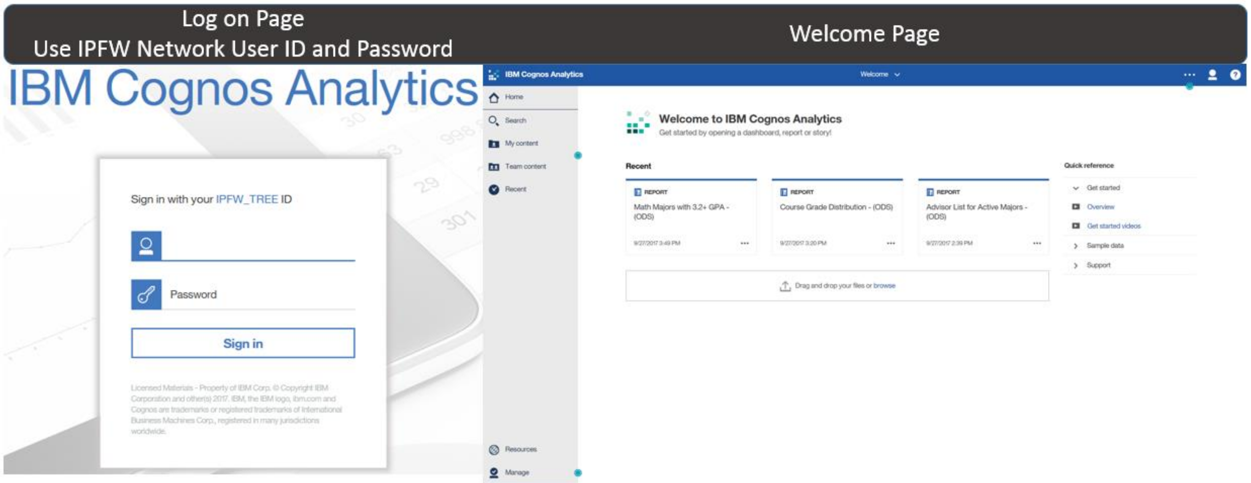
http://www.itap.purdue.edu/security/policies/dataConfident/restrictions.cfm

Accessing Cognos Analytics

- All users access Cognos with their network User ID and current Password.
- Internet Explorer, Google Chrome, and Mozilla Firefox can be used with Cognos Analytics.
  (NOTE: Some features do not work with certain Browsers. Internet Explorer is the most compatible).
- Users can only use Cognos off campus via a VPN connection. Contact the IPFW Helpdesk at 481-6030 for more information.

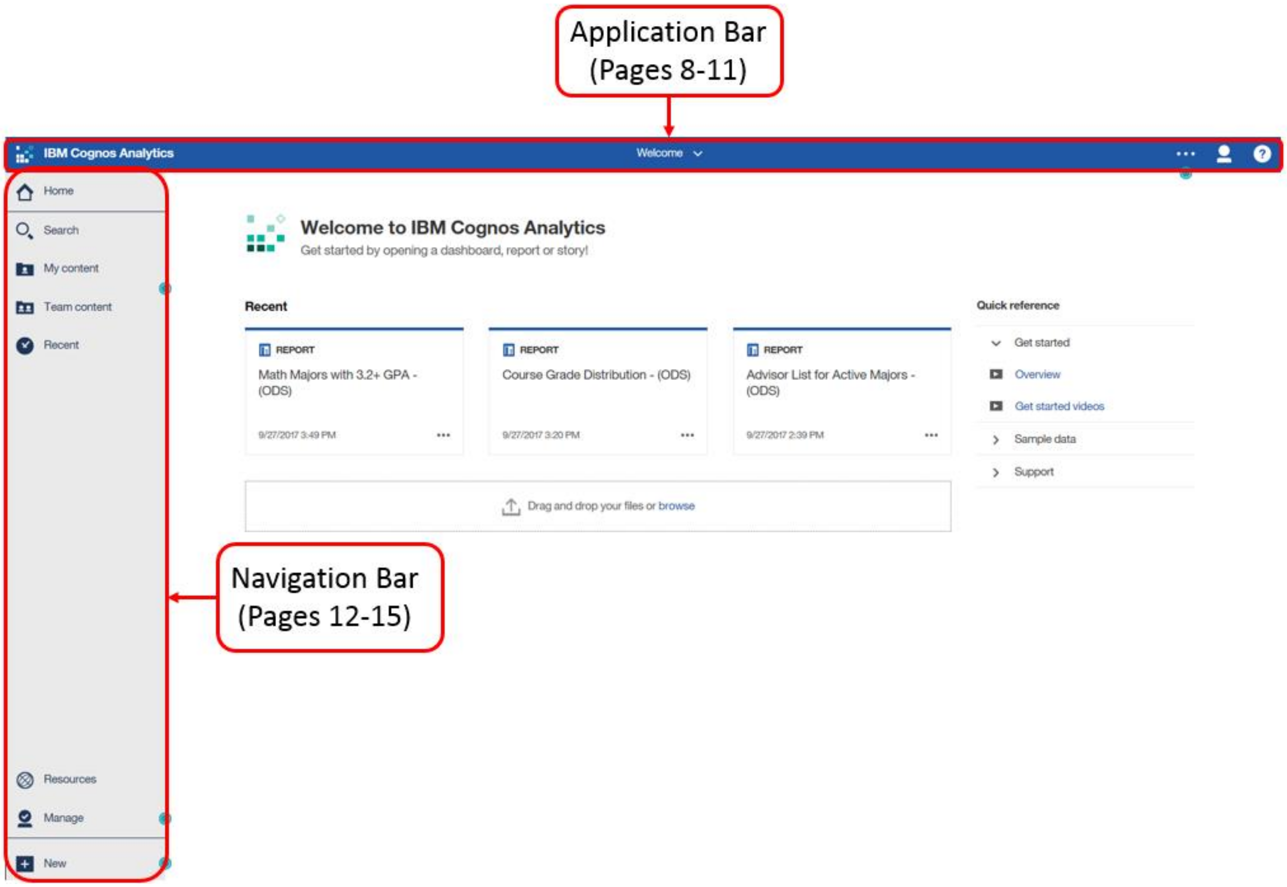
General Use URL (PROD)

The URL for Cognos is **https://cognos.ipfw.edu/ibmcognos.**
NOTE: For future use, you may wish to add the **Log on** page to your **favorites** list or the **Links** toolbar.

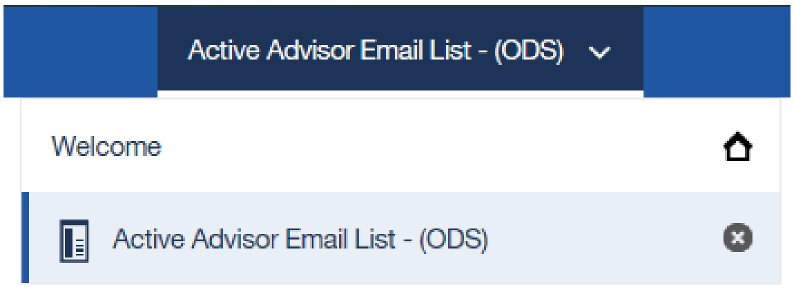
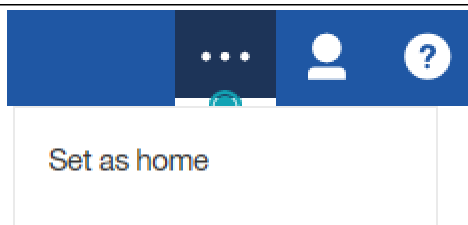
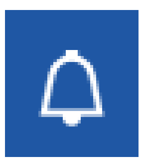


When authentication is complete, you will see the ***Welcome to IBM Cognos Analytics*** main page.

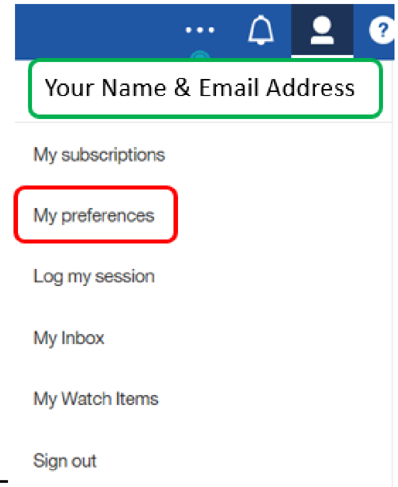
Main Portal Page Content



Application Bar

	**<u>Welcome</u>** • Toggle between main portal page and new or opened reports. • House icon indicates you are on the Home Page. • Used to close reports and object windows. • Use ⊗ to close open reports and other windows.
	**<u>More</u>** • Used to set reports as your home page. (*Default is main portal page*) • Capabilities change depending where you are in navigation.
	**<u>Notification Indicator</u>** • Alerts user when subscribed reports have finished executing.
	**<u>Personal Menu</u>** • Settings related to you as the user. • Includes preference settings and Subscription maintenance. • Use to sign out of Cognos.

Personal Menu



The personal menu related to anything related to you as a user including your security settings, and personal preference settings within the portal.

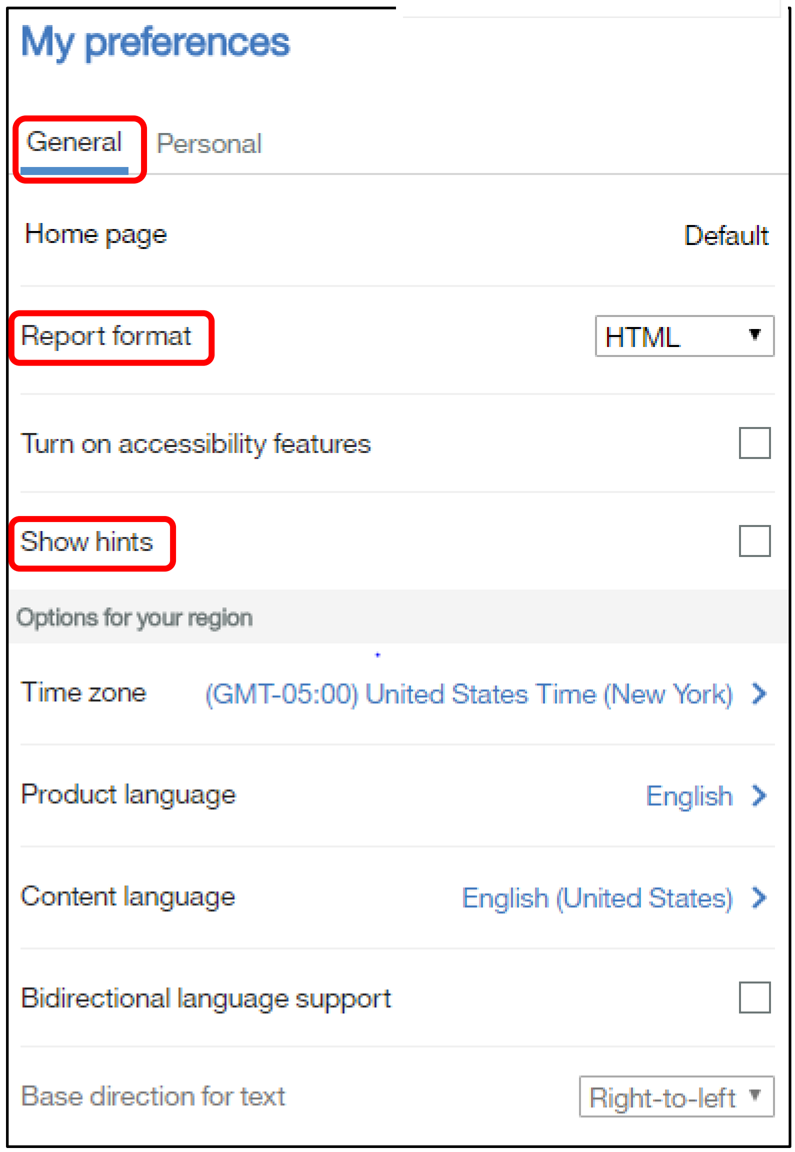
<u>My Preferences</u>

1. **Click** on the ***Person Icon***  located on the ***Application Bar*** and select ***My preferences***.

- ***Report Format***: Users can change all reports to run in a preselected mode, *but not recommended*. Default is HTML.

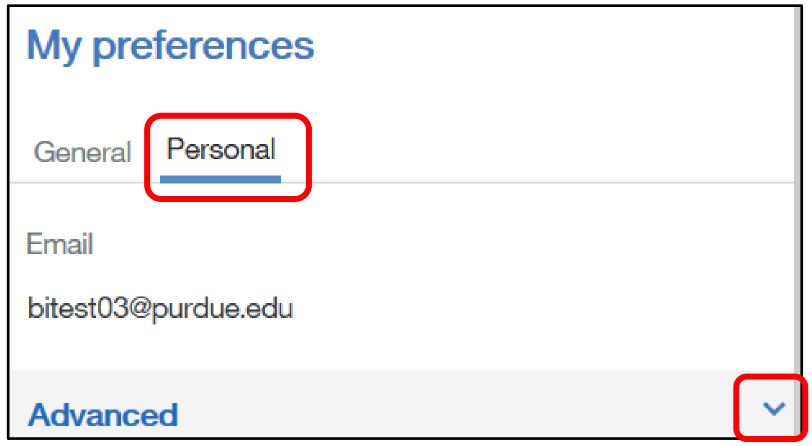
- ***Show hints:*** Users can turn hints  displayed on the main portal page. The current setting in this example is off, or unchecked.

Additional settings are not typically changed.



2. **Select** the ***Personal*** tab.

3. **Select** the ***down arrow*** across from ***Advanced*** to open additional options.



Renew credentials after changing your password for Subscriptions and Schedules can be found here.

4. **Click *Renew*** after password changes for Subscriptions and Schedules to continue running.

Additional settings are not typically changed.

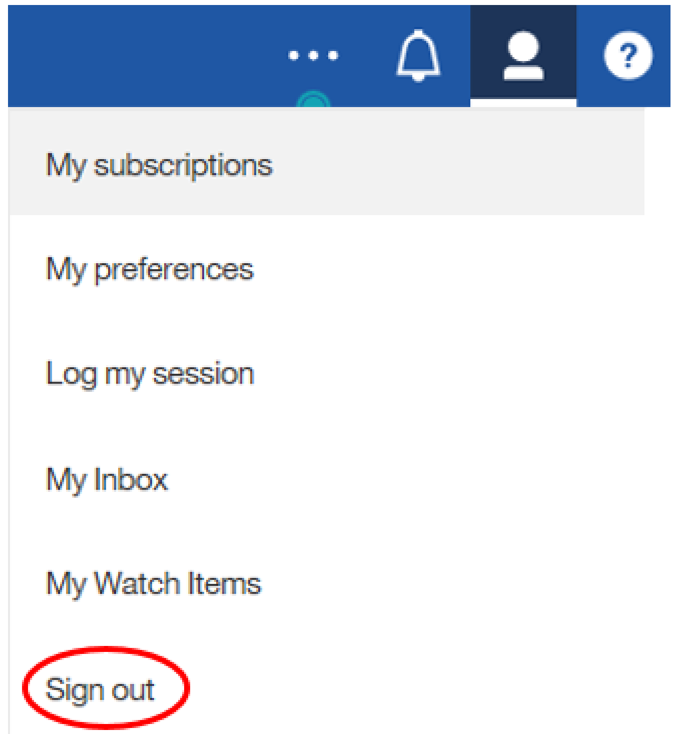
<u>My Subscriptions</u>

Users can subscribe to a report they use often or on a regular bases. When you subscribe to a report, the subscription includes all your prompt and parameter values. The form will show all subscriptions and is used to allow edits and deletions.

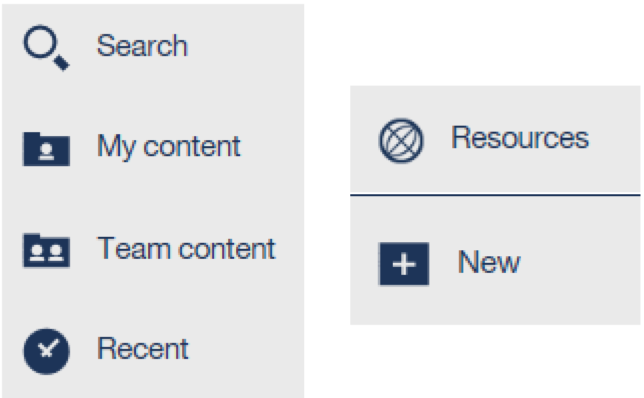
More details and steps for creating subscriptions are found on page 30.

Sign Out

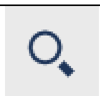
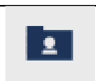
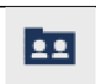
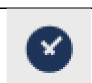
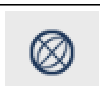
1. **Click *Sign Out*** to leave Cognos Analytics.
2. **Close** the browser.



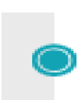
Navigation Bar



Note: Icon descriptions only display if monitor size is wide enough. If you only see icons, hover over the icons objects to display descriptions.

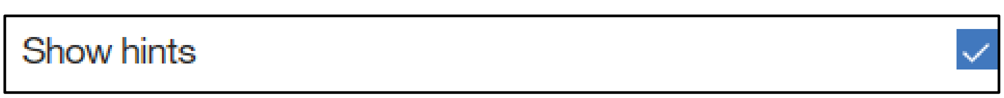
	**Search**	Search for items by keywords and select Enter key. Searches can be saved.
	**My content**	My Content folders (previously My Folders tab)
	**Team Content**	Team Content folders (previously Public Folders tab)
	**Recent**	Recently viewed objects
	**Resources**	Click to find links to additional information on Cognos 11, Authoring, and other documentation related to reporting at Purdue University, (formerly Resources tab).
	**New**	To create a new report, select the icon.

Hints Icon



The Hints icon appears beside suggested icons. Clicking on the green button will open an information box explaining what the icon next to the Hints icon can do for you.

- Each information box contains a ***Turn off hints*** link if you choose to not use the Hints icon.
- Users can also disable/enable the ***Show hints*** feature under ***My preferences/General tab***.



Navigating Cognos Analytics Folders and Objects

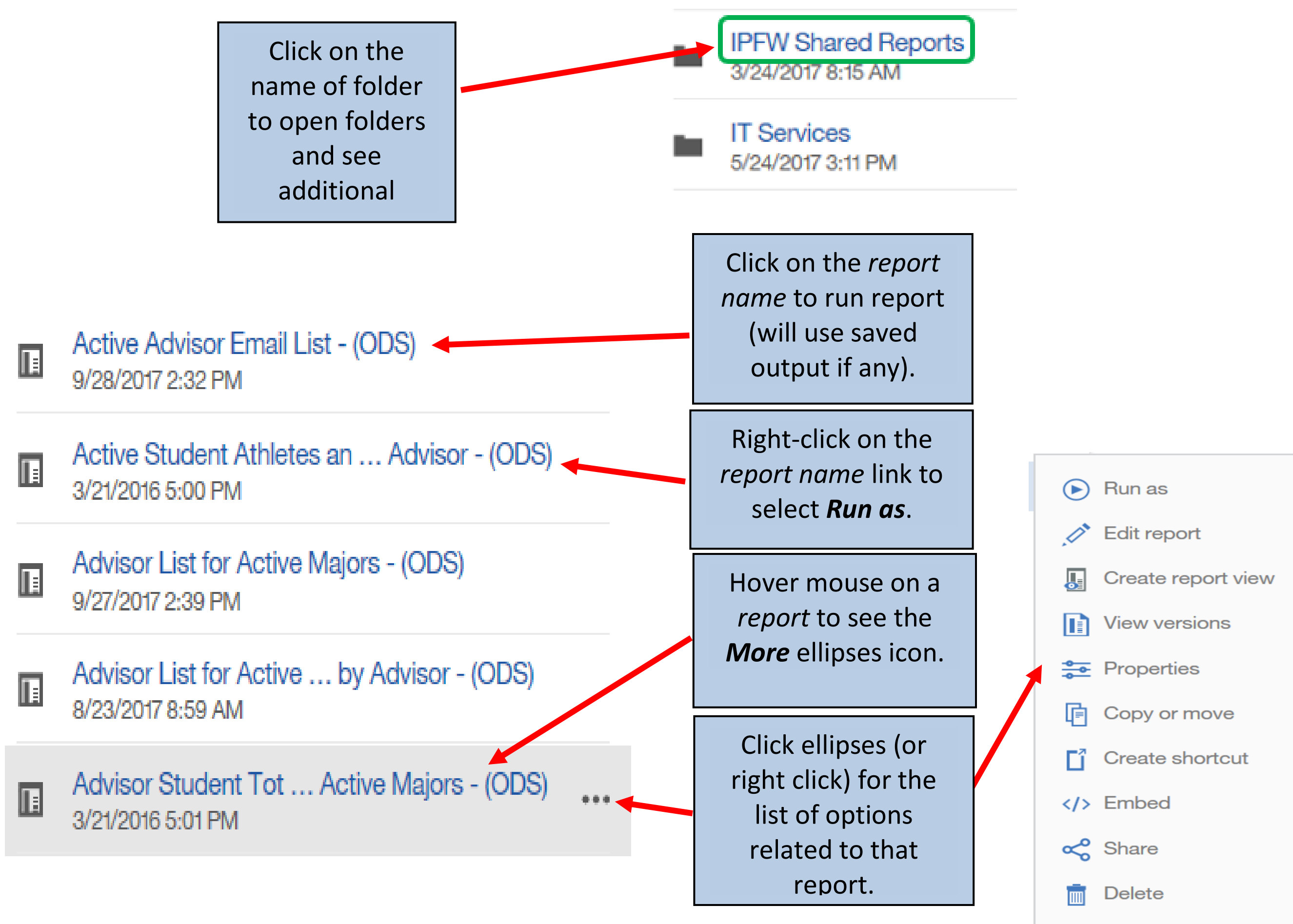
My Content	Team Content	Resources
• Formerly My Folders • Default tab from Cognos • Contains objects only viewable by user • Users can copy reports from Team Content folders and save to My Content for personal use • Not recommended for storing reports being shared by multiple users	• Formerly Public Folders • Default tab from Cognos • Contains standard reports and departmental folders and reports • Contains IPFW Shared Reports folder • Users view items based on security roles	• IPFW Specific documentation and information • All users can view this tab • Consumers cannot save items in this tab • Authoring resources

Icons in My Content and Team Content

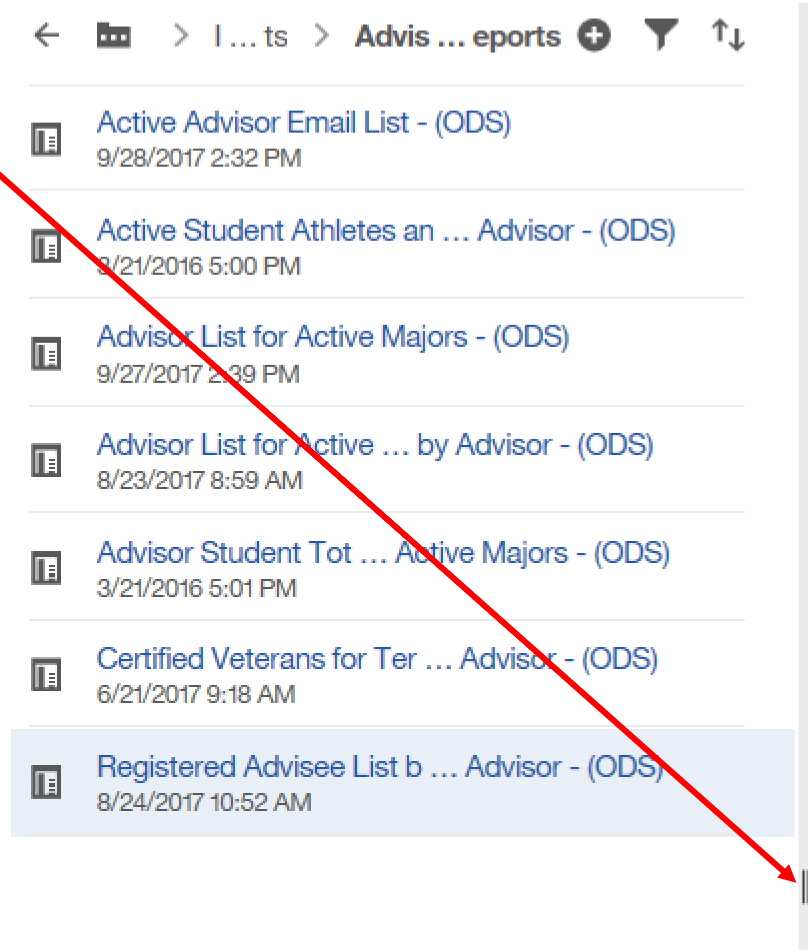
Folder	Package	Report Studio Report	Query Studio Report	Report View	Dashboard	Shortcut

Note: Users may or may not see some of these options as they are based on access and Cognos license capabilities.

- The first pane generally contains folder icons. Clicking a folder will open anther pane.



- Place the curser over the double-line icon and click to widen the window pane as needed.
- Click off the window to close the window.



Breadcrumb Trail

The Breadcrumb Trail keeps track of where a user has been in clicking through the folder structure. In Cognos Analytics, as users click through the folders, the Breadcrumb path collapses as more folders are selected. This makes it more difficult for a user to find their way back 'home'.

There are many options for users to work their way back or display their path.

1. **Navigate** to ***Team Content, IPFW Shared Reports***, and **click** the ***Advisor Reports*** folder.

2. **Click** on the ***folder icon*** located in the ***Breadcrumb trail*** to see the previous folders uses to navigate to the current folder.

3. **Click** off the folder area and **click** on ***Team content*** in the ***Navigation*** pane to reopen the window pane.
4. Now **select** the ***back arrow***. This will take the user back one folder level with each click.

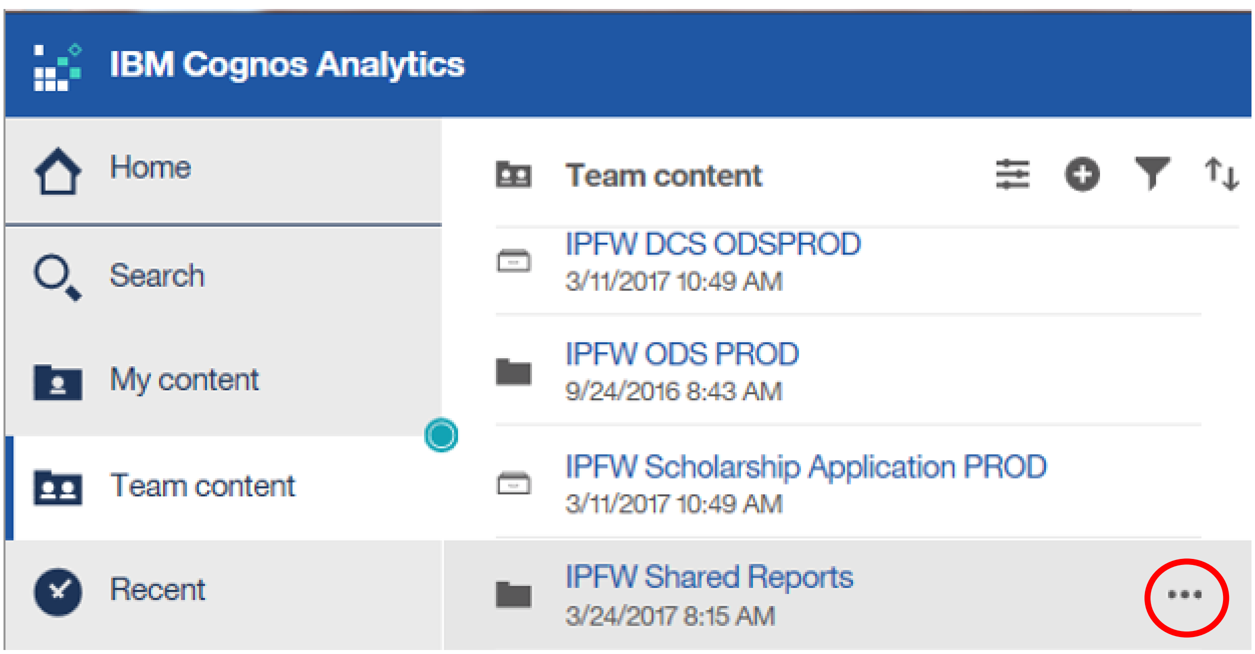
Users can also pull menu to the right to view entire path.

5. Hover the curser over the right side of the box. When the double line and double arrow curser appears, drag the window to the right.

- Each time the ***Team Content*** is chosen from the ***Navigation Bar***, it will automatically return to this view until selecting ***Team Content*** from the ***Breadcrumb Trail*** and clearing the breadcrumb menu

Folder Features

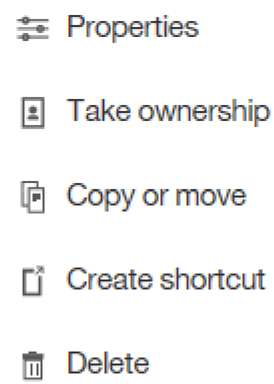
1. **Navigate** to ***Team Content, Samples, Reports***.



2. **Hover** over ***Standard Reports***. **Click** the ***ellipses*** to the right of the name.

3. The options list for folders opens.

Note: Users may not see some of these options as they are based on access and Cognos license capabilities.



	Properties	Displays folder owner, shows folder create and modify dates, and view a folder description if provided.
	Copy or move	Copy folder object to another destination in Cognos.
	Create shortcut	Used to create a shortcut version of the folder.
	Take ownership	Used to update logged in user to become folder owner.
	Delete	Used to delete a folder.

Report Features

Once you have reached a report, there are many options to note in the portal.

1. **Navigate** to ***Team Content, Samples, Reports***, and **click** the ***Standard Reports*** folder.

<u>Breadcrumbs</u>

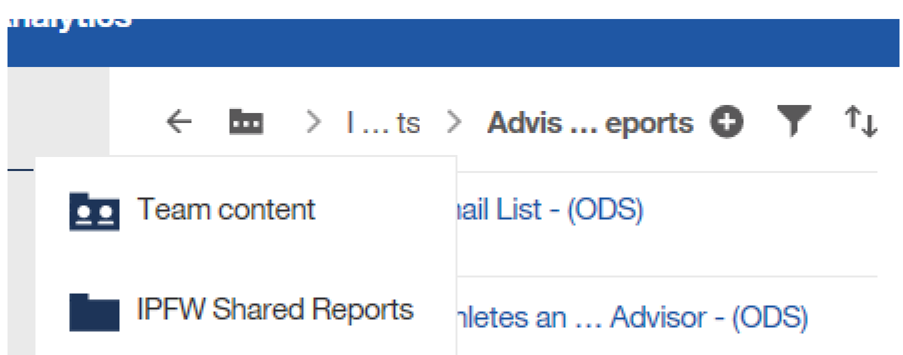
The Breadcrumb path will display in one of two ways depending on the monitor size.

<u>Wider monitor</u>:

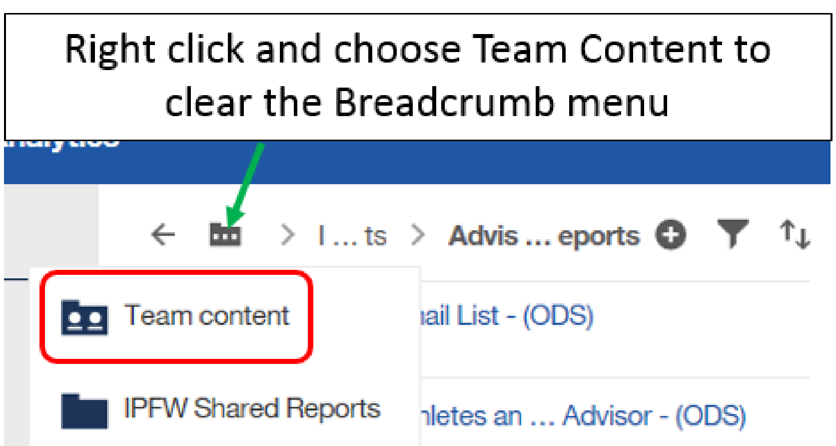
OR

<u>Smaller monitor</u>:

You can click the folder to display the breadcrumb path.

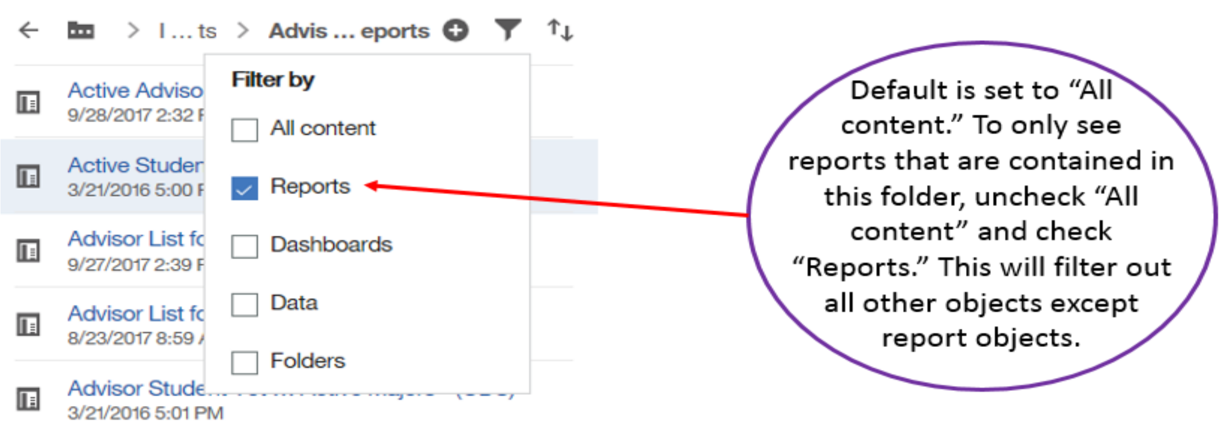


2. The pane will automatically become static to allow easy selection of other features. Each time the ***Team Content*** is chosen from the ***Navigation Bar***, it will automatically return to this view until selecting ***Team Content*** from the Breadcrumb menu and clearing the breadcrumb menu.



Filtering Folder Content

3. **Click** on the ***Funnel*** icon to open filtering options.



4. Use the ***plus icon*** to the left of the ***filter funnel*** to create new folders. Available to all uses in the ***My Content*** folder. ***(Note: Some users will see it in Team Content as it is based on folder security).***

5. **Right-click** on ***Customer lifetime value analysis*** report <u>OR</u> **click** the ***ellipses*** to the right of the report name. Notice the row is highlighted and an options menu appears.

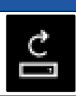
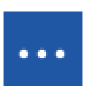
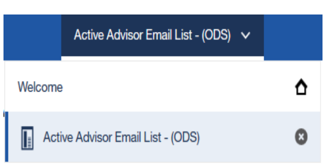
	Run as	Allows selection of report output type and Run in background mode
	Edit Report	Opens report in editing tool for changes/edits
	Create Report View	Creates a report view, usually used to create a copy for scheduling
	View versions	Displays any previously saved report output
	Properties	Displays report owner, shows report create and modify dates, and view the report description if provided
	Take ownership	Used to update logged in user to become report owner
	Copy or move	Copy report object to another destination in Cognos. Must have write access to other destination.
	Create shortcut	Used to create a shortcut version of the folder. *Not generally recommended.*
	Embed	Add report url (with iframe) to other applications
	Share	Copy link to share content with other users
	Delete	Used to delete the report object

Note: Users may not see all of these options as they are based on access and Cognos license capabilities.

Running Reports

1. **Select *Team content***, ***IPFW Shared Reports,*** then ***Advisor Reports***.
2. **Right-click** the report link ***Active Advisor Email List – (ODS),***
3. **Select *Run as,*** then **click *Run***.

The report will run and display output within the same window.
New options appear on the Application bar.

	**Save**	**Save as:** Save the open report to another folder within Cognos. **Save as report view:** Used to create a Report view copy of the report for scheduling reports. (***Note: Available for all users. Users can only save to folders where they have write access).***
	**Run**	Users can select to rerun a report in a different output, rather than the current default setting. *(See next page)*
	**Refresh**	Used to refresh the portal page
	**More**	The ***More*** options change ***when a report is open***. It allows a user to: • Set the current report as their home page • Share the report by providing the url link to the report ***(Note: recipients of the link must have a Cognos license to open and view the report).*** • Embed the report into another document • Create a ***Subscription*** to the report
	**Welcome**	The ***Welcome*** icon changes to show what you currently have open. In this example ***Customer lifetime value analysis*** is the only other object currently open. • Click the to close the object/report. • Click to view open windows, close windows, or toggle between open windows.

4. **Close** the ***Active Advisor Email List – (ODS)*** report window.

Report Output Format Options

This document provides information on the Cognos output options and behaviors when exporting Cognos reports.

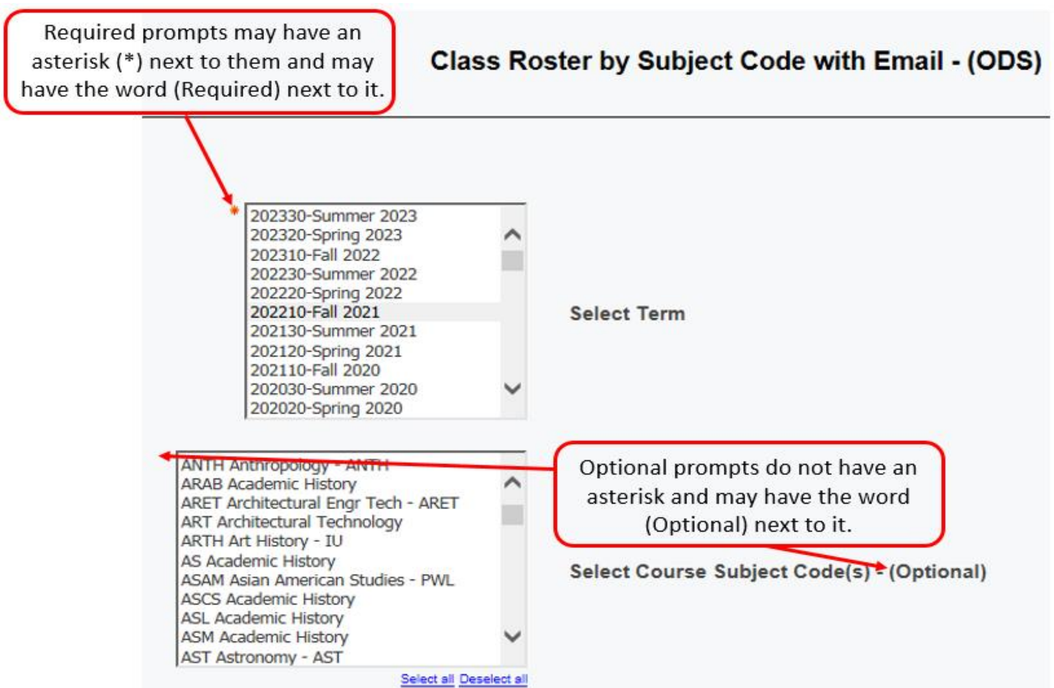
HTML	• This is a report's usual default. • Web based and designed for viewing report output on-screen. • If the report contains tabbed layouts, all pages will be displayed and accessible.
CSV	• Export data which is tab-delimited and can be imported to (or read by) other software. • Strings are not enclosed in quotation marks. • CSV exports show only the results of the report query. • Page layout items, such as titles, images, totals, and subtotals, etc., **do not appear.** • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
Excel	• Previously named Excel 2007 Format • Supports lists, crosstabs, icons, titles, subtotals, totals, and charts. • Preferable over Excel 2002. • Each page of a tabbed layout will render as its own worksheet in Excel. ***NOTE: Authoring Users: If Rows per Page in the Report Page Properties is populated with a value, this Excel version will page break into separate worksheets based on the number of rows per page.***
Excel Data	• Report formatting (titles, charts, icons, subtotals, totals, etc.) are dropped and data is returned in spreadsheet format (like CSV file). • Only the first page of tabbed layouts will appear. • If the first page of the report contains more than one report object (list or crosstab), only the first object is displayed.
PDF	• Used for printing and distributing output in Adobe Acrobat Reader. • You must have administrator privileges to specify the advanced PDF options. • Each page in a tabbed layout report will render its own page. ***NOTE: Authoring Users: To modify the PDF default settings for the report, open the Authoring tool and open the properties for Page, then PDF Page Setup.***

Prompts

Most reports will display a prompt page once you send the request. This helps make reports more versatile for more users. It also helps the report process faster by limiting the amount of data coming back from the database.

- Prompts can be single or multiple pages.
- Prompts can be required or optional. A **red asterisk** * indicates this prompt is mandatory.
- **Finish** or **Submit** buttons are grayed out until a mandatory prompt is selected.
- Some prompts only allow you to choose one value.
- Use the **Ctrl** key and/or **Shift** key with the mouse to select multiple values within the prompt box.
- Some prompts have **Select all** and **De-select all** links below the prompt.
- All prompt pages contain a ***Cancel, Submit, Finish*** or ***OK*** button to cancel or execute the report.
- If prompts are optional and none are selected, the report may take longer to complete.

Not all prompt pages look the same. Report authors have the ability to create different designs and layouts based upon the best use for the data and report.



1. **Navigate** to ***Team content***, ***IPFW Shared Reports***, ***Class Rosters***, and **right-click** on ***Class Roster by Subject Code with Email – (ODS)*** and **select *Run as,*** then **click *Run.***
2. **Select *201810*** in the ***Select Term*** prompt.
3. **Select *ANTH Anthropology - ANTH***.
4. **Select *Finish***. Report will return with only ***Anthropology course for Fall 2017*** rosters.
5. **Close** the report.

Drill Through Reports

Some reports may contain drill through links which allow users to see more details by opening a second report.

- **Drill Throughs can only be used when processing the report in HTML format**
- **This feature is not found on all reports**

1. **Navigate** to ***Team content***, ***Enterprise***, ***Standard Content***.
2. **Click *Standard Content Metadata.***
3. On the prompt page**, select *FI*** in the ***Subject Area*** prompt**,** and ***Account Summary*** in the ***Title*** prompt block.
4. **Click *Submit***.

Drill Through reports are indicated by the blue text color and blue underline hyperlinked to a more detailed report. In this example, the hyperlinks are for the ***Account Summary*** report details.

5. **Click** the ***blue report link Account Summary*** to drill down into the data.

Subject Area: FI

Title	Executive Summary
Account Summary	Provides a listing of valid accounts with management balances and cash balances (for Unit Revenue Funds) including the details of the management balance formula (Carryforward, Revenue, Expense, Transfers and Commitments). In addition this report also has a drill thru to the Statement of Financial

A new browser window opens for the drill through (child) report. The report displays detail about the report including calculations, prompts and filters.

PURDUE UNIVERSITY

Content Metadata

Report Name: Content Metadata Drill Through
Run Date: Jul 7, 2017
Run Time: 2:37:38 PM

Title: Account Summary

Calculations	Prompts	Fixed Filters	Intended Audience
Management Balance = ([Carryforward] - ([MTD Revenue] + [MTD Expenses] + [MTD Transfers] + [MTD Commitments]))	Required: Fiscal Year; Fiscal Year Period; Optional: Fund, Fund Subtype; Fund Type; Funds Center; Department; Major Area; System Level 3; System Level 2; System Level 1	MTD Transfer: case when [Financial Balances Star].[Commitment Item].[Category 1] in ('Transfers') then [Financial Balances Star].[Financial Balances Fact].[MTD Revenue]+[Financial Balances Star].[Financial Balances Fact].[MTD Expenses] else 0 end Carryforward: [Financial Balances Star].[Financial Balances Fact].[Conversion Balance]-[Financial Balances Star].[Financial Balances Fact].[MTD Revenue] -[Financial Balances Star].[Financial Balances Fact].[MTD Expenses]	Business Management

6. **Close** the browser window to return to the original report, ***Account Summary*** output.
7. **Close** the report.

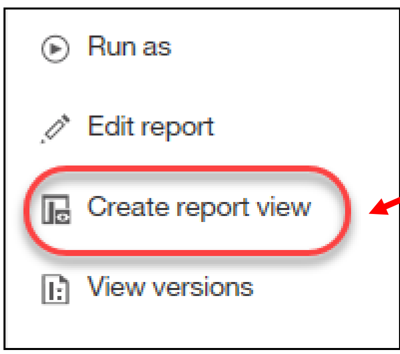
Creating Report Views

Reports, created by report authors and stored in available folders, may be saved as report views in your own **My Folders** or **departmental folders**. This allows you to save your favorite reports in a location that is easily accessible.

NOTE: Creating Subscriptions automatically creates a Report View. The steps below would be used to create a Report View for scheduled reports or general use of the report to save selected prompts.

- Report views are a combination of a shortcut and a dynamic copy of the original report.
- If the source report is moved to another location, the report view link is not broken.
- If the source report is deleted, the report view link to the source report is removed and the report view will have to be re-created.

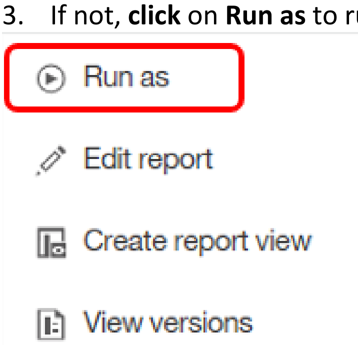
1. **Navigate** to ***Team content, IPFW Shared Reports, Advisor Reports, Active Advisor Email List – (ODS)***
2. **Right-click** on the report name.



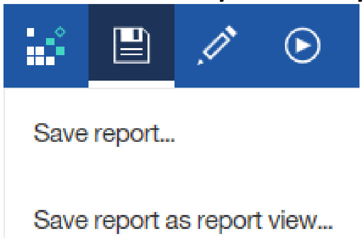
IF YOU SEE…

Then skip to first column, Report Authors, on the next page.

3. If not, **click** on **Run as** to run it in HTML.

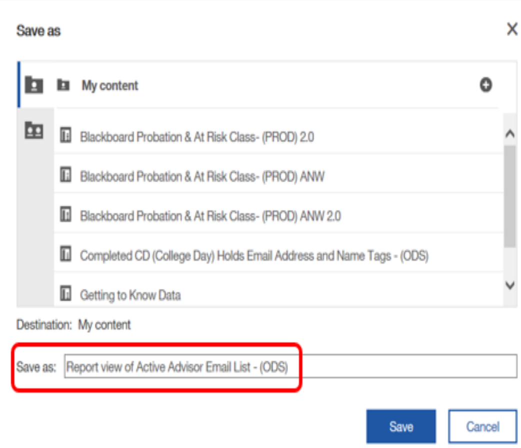


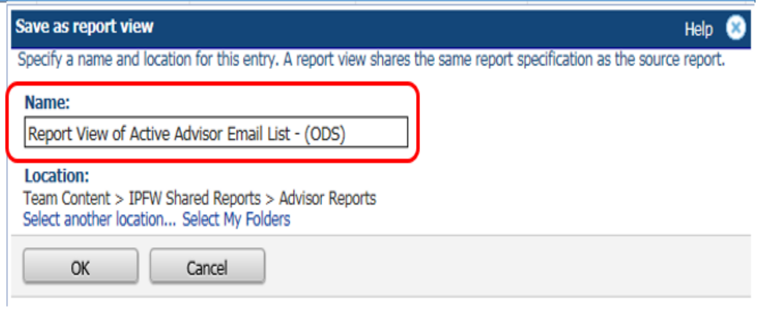
4. **Select *Save report as a report view*** on the ***Application Bar***.



Move to second column, Consumers, on the next page.

Report Authors	Consumers





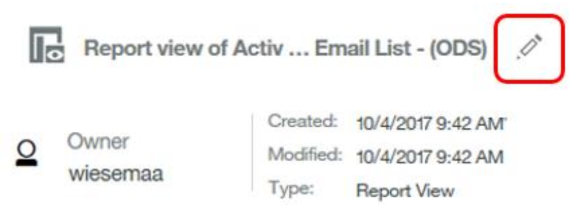
*NOTE: Users will only be able to save the report in their **My content** folder or departmental folder in **Team content**).*

Notice the report name has been changed to ***Report view Of Standard Content Metadata***. Cognos defaults the original name of the report and adds **Report view of** at the beginning.

In this example we saved it to ***My Content***.

The report will alphabetize within the list. Notice the report icon has changed.

5. **Select *My content***, and **find** the new report ***Report View of Active Advisor Email List***.
6. **Right-click** on the report name, or **hover and click** the **ellipses.**
7. **Click *Properties*** then **hover** to the right of the report name.
8. **Click** the ***Edit Pencil*** that appears.
9. **Click inside** the ***Report name block*** and **remove *Report View of*** from the title. ***(NOTE: This step is optional. Users may wish to keep the reference in the title).***

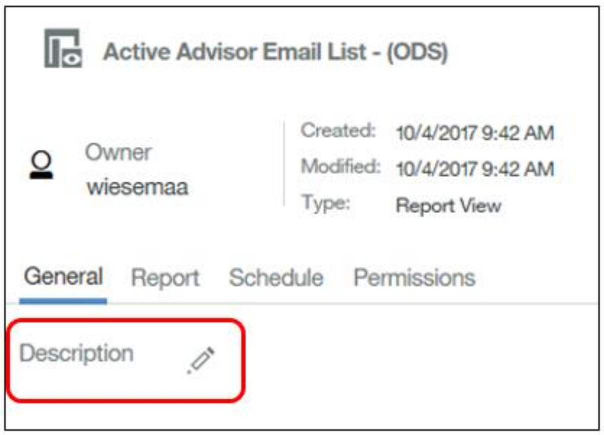


- *It is highly recommended you create a subfolder in **My content** titled Schedules and save the report view in it if you plan to use the report view as a scheduled report.*
- *If the scheduled report is to be used by others in your department, create a Schedules folder in your departmental folder and store the report*

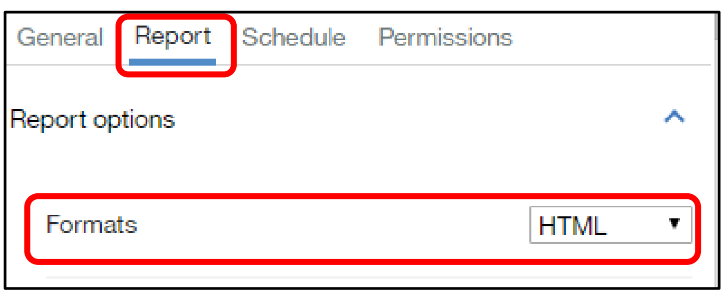
Report View Options

1. Using the new ***Report View Copy just created***, **Right-click** on the report name and **select *Properties*** from the list of options.

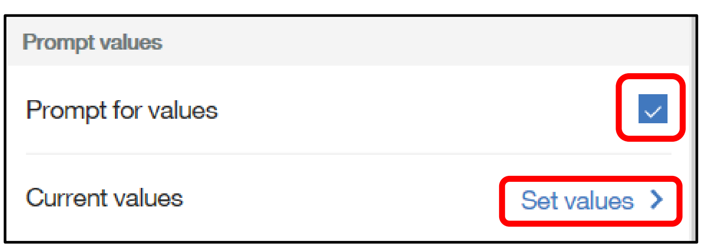
2. Once the properties pane opens**, click** on ***Advanced*.**
3. **Hover** over ***Description*** and **click** the ***pencil*** to add or modify the description.



4. **Select *Report*** on the ***menu***.
5. **Use** the ***drop down arrow*** next to ***Report options*** to change the format to ***HTML***.



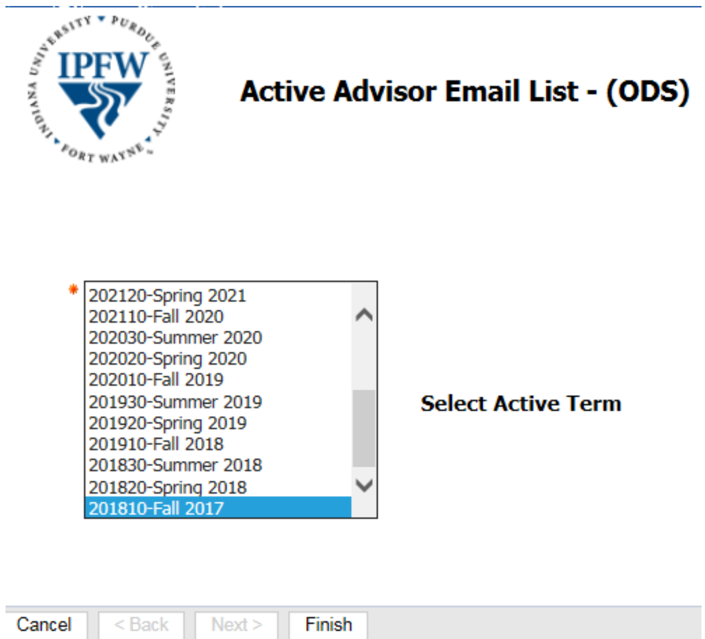
6. Make sure the ***Prompt for values*** box is checked.
7. **Select *Set values***.



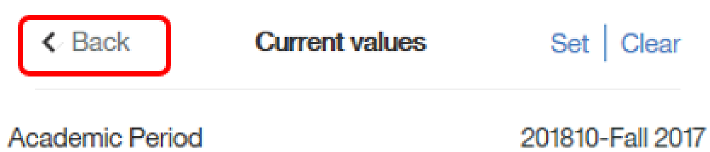
8. When the pane changes, **select *Set*.**

   Select *Clear* if you want to change previously selected values.

9. When the prompt page opens, **select** the following options:



10. **Click** the ***Finish*** button on the top or bottom of the prompt page.
11. **Click *Back*** option to return to the ***Report View Options*** pane.



The prompt values selected will appear on the right side. Prompt names appear on the left.

Current selections are counted and displayed.

12. **Click** on the ***Advanced*** option to see additional settings.

13. **Scroll** to the top and **select *Schedule*** from the menu if you wish to create scheduled output. ***(Note: Scheduling report runs is covered in course COG 111 at West Lafayette).***

The ***Permissions*** option is rarely used as it is tied to security. It's generally only used by Cognos Administrators or selected Cognos department managers.

14. **Right-click** on the ***Active Advisor Email List – (ODS)*** report view in the first pane to close the Properties pane and open the options pane again to review the remaining options for report views. ***(NOTE: Descriptions on page 16).***

15. **Close** the report.

View and Manage Saved Report Output

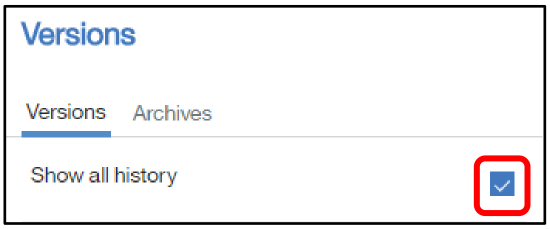
Users may view saved report output and view and manage previous saved output versions.

1. **Right-click** on ***Team content, IPFW Shared Reports, Advisor Reports,*** then ***Advisor List for Active Majors – (ODS)*** report ran in the previous steps.

2. **Select** ***View versions*** in the options pane that opens.

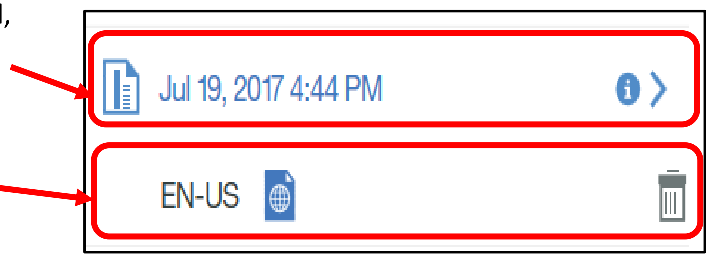
(NOTE: User must have access to the report).

3. **Click** the ***Show all history*** box to see the entire list of saved output.



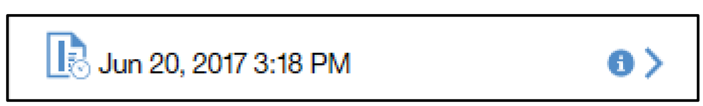
A list will appear, different that one shown below).
Two types of content are stored here, ***Saved Report Output Versions*** and ***Run History***.

- Saved output will appear as a link and if clicked, will open saved output options.
- Click the attachment to open the saved report Output in the format indicated.
- The trash can icon is used for deleting the saved output.



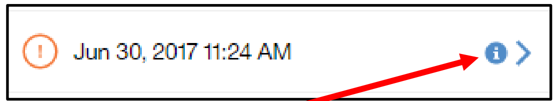
Cognos will default only 1 saved output file at a time. Only the most recent output will have the saved report output available. (Default settings can be changed in the Report Properties, Report, Report output versions, section of the report).

A saved output run history appears in black text and will also generate a record of the report run.

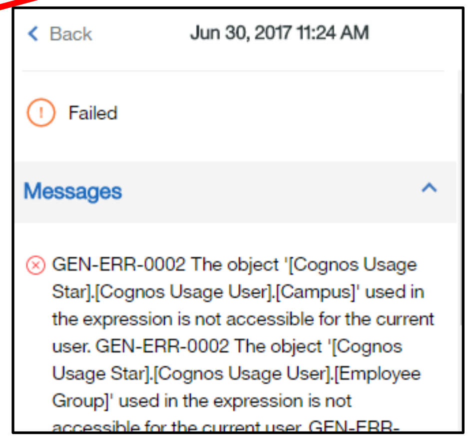


Cognos will default 5 report run records before deleting the first one. Users can not delete these records. (Default settings can be changed in the Report Properties, Report, Run history section of the report).

In this example, notice the first report has a red exclamation icon. This indicates the report failed to run.



Click on the blue arrow across from the report to see the fail message.



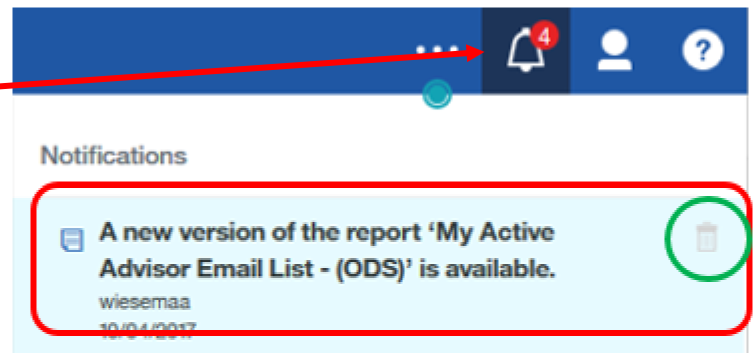
4. **Close** the report.

Creating Subscriptions

- If you use a report on a regular basis, you can set up a subscription to be delivered to you on a preset schedule. You can pick the time, date, format, output types and where you want it delivered.
- ***The subscription set up option is available ONLY when you run and view report output, but not when you are in editing mode or when you view saved output.*** If you edit a report, you must save it before you can subscribe.
- After you subscribe, each time your report is delivered, you are notified via a Notification indicator on the Application Bar.

Click on icon to see the message.

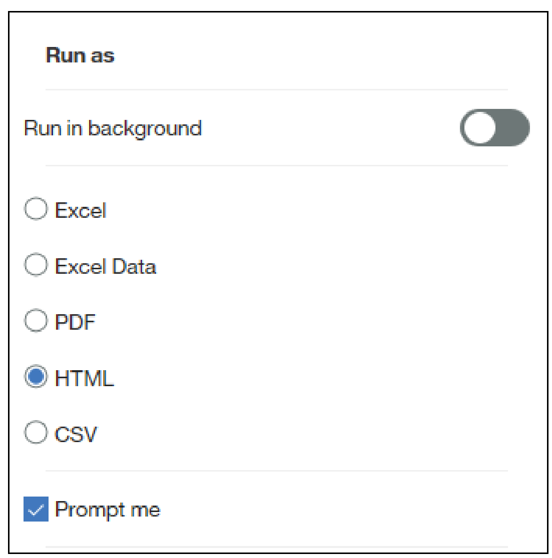
Hover and click the trash can icon to delete the message.



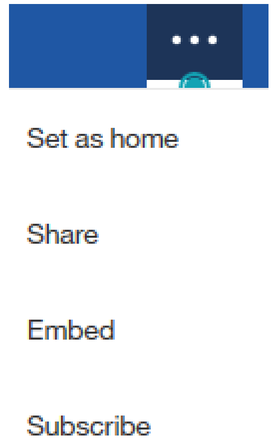
- **SUBSCRIPTIONS CAN NOT BE USED FOR DISTRIBUTING REPORTS TO OTHER USERS. Scheduler feature must be used for multiple email distributions.**

1. **Go to *Team Content, IPFW Shared Reports, Advisor Reports, Active Advisor Email List.***
2. **Right-click** on the report and select ***Run As.***
3. Make sure ***HTML*** is selected then **click *Run*** at the bottom of the pane.

(NOTE: This step must be done to avoid using any previously saved output for this report).

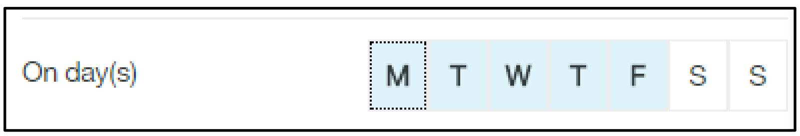


4. Leaving the report open, **select** the ***More*** icon and **click** ***Subscribe***.



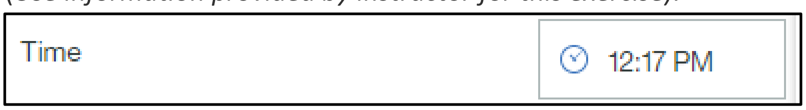
The subscription options pane opens with personalized options for how and when to run the report.

5. **Select** one or more days for the report to run. Select M, T, W, T, F, making sure they are highlighted.



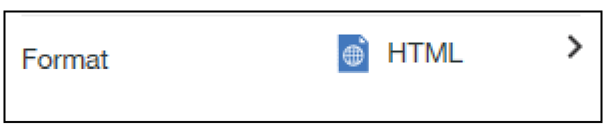
- Day(s) highlighted in light blue will generate a report.
- Defaults to current day.

6. **Click** on the ***Time*** box to open up month, date, and AM/PM selection. (*Use information provided by instructor for this exercise).*



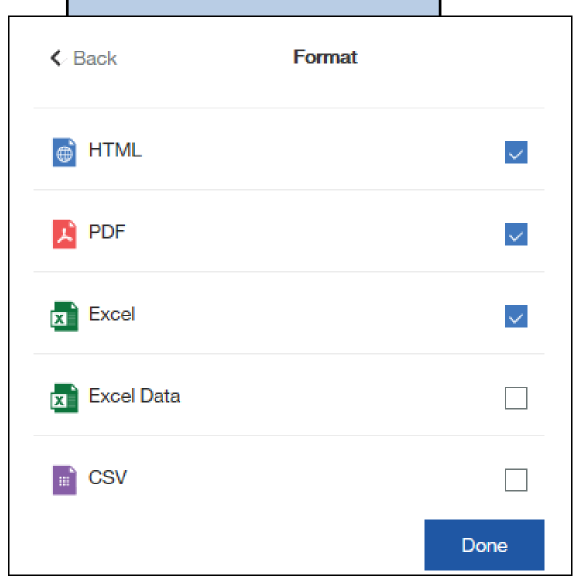
- Time the report will run for selected day(s).
- Defaults to current time.

7. **Click** the ***arrow*** on the ***Format*** line to select output format(s).



- Multiple selection is available.
- Defaults is HTML.

8. **Select** ***PDF***, ***Excel***, and leave ***HTML*** checked.
9. **Click** ***Done***.



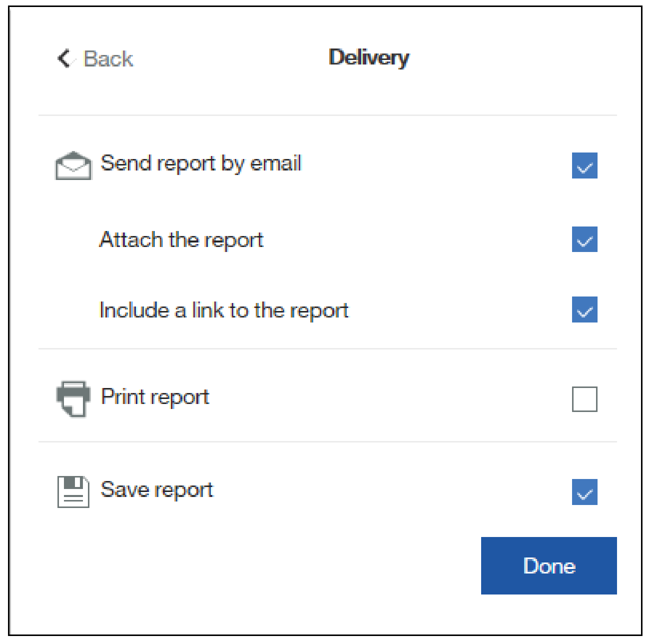
10. **Select** the blue arrow on the ***Delivery*** line to set delivery options.

8. **Click *Send report by Email***.

9. **Select *Attach the report*** if desired and leave ***Include a link*** checked

10. Make sure ***Save report*** is checked.

(NOTE: DO NOT select Print report. This feature is not available).

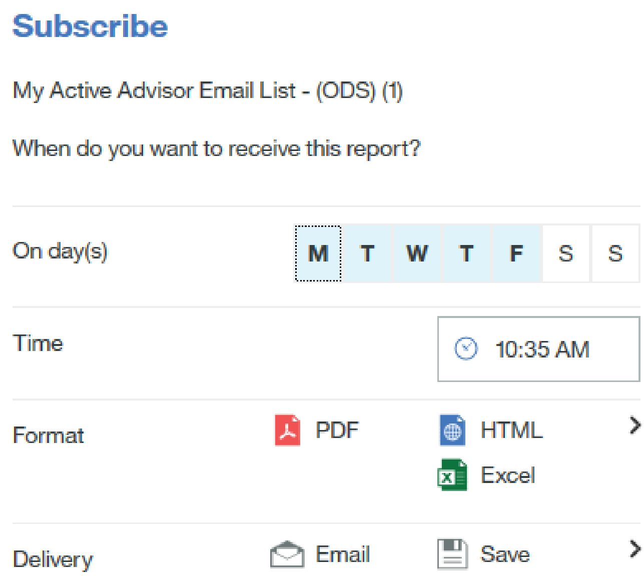


11. **Select *Done***.

12. Prompts are not accessible to change at this level. Display indicates how many prompts are available on the report.

- ***The subscription saves the prompts from the initial run.***
- ***Users are not given an option to change the prompts until after the subscription has been created. Users must open their My Subscriptions on the Personal Menu tab to change the subscriptions.***
- ***Cognos will save the selected values until you change them.***

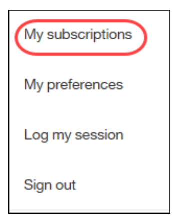
Your new Subscription should look like this.



11. **Select** the ***Create*** button to create the new Subscription. You will receive a message at the top of the page that the Subscription was submitted successfully.

12. **Close** the report.

For changes, maintenance, or deletions, **click *My subscriptions*** under the ***Personal Menu***.

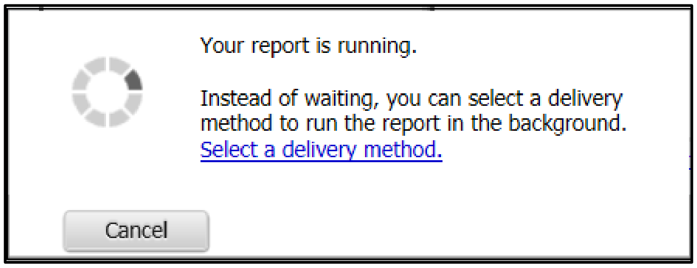


- Uncheck the Enabled box to temporarily stop the subscriptions.

- Use the dropdown arrow to open options to modify, view, and delete.

Server Response Considerations

When a report is initiated, the server generates the final report. Depending upon the amount of data being returned and the design of the layout, some response times are longer than others. While the server is gathering the necessary data, this message appears:

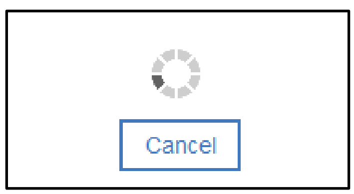


- When the server has gathered all of the requested data, the report will appear in the window in the format you requested (PDF, HTML, etc.).

If you need to cancel a report run:

- ***Do not close Internet Explorer without letting the report complete or cancelling it.*** If you neglect to do one of these actions, the server continues to gather data.

- Use the Cancel button displayed when report is running. This will properly stop the data gathering and clear the server.



- ***Do not click on* Select a delivery method *link.*** The report processing will stop and you will have to rerun the report.

Best Practice for Email Report Output

If using the email options for report distribution, please consider the following:

- report content (FERPA, HIPPA or other security restrictions)
- output type selected (Excel, PDF, HTML, etc.)
- report recipients access to Cognos

1. **The intended user(s) have a Cognos license**
   and
   the report contains sensitive or restricted information

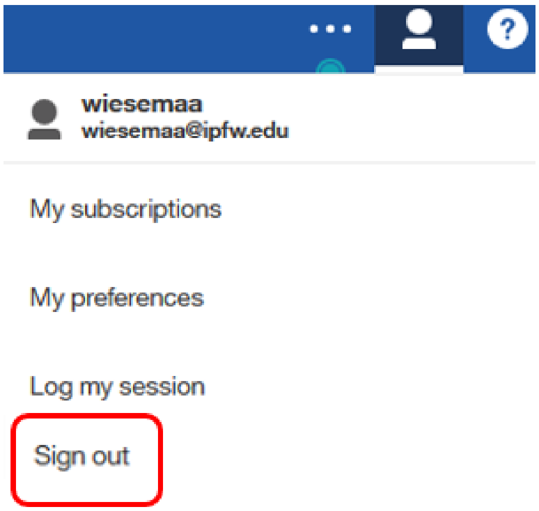
Suggested use for all users with a Cognos license	
Include a link to the report	Use this option if you need the report to stay within Cognos for security reasons. Recipients receive the link and log into Cognos to review the output. **Recipients must have access to Cognos to use this feature.**
	All output types can be used.
	This is the most secure option for report delivery.

2. **The report does not contain sensitive or restricted information**
   and
   the user does not have a Cognos license.

Only use when data does not contain sensitive information	
Attach the report	Use this if you want the output as an email attachment.
	All output types can be attached. Cognos stores all types.
	This option is less secure. Consider any sensitive report output before using this feature.

Logging Off

1. **Click** the ***Personal Menu*** and ***Sign out*** to log out of Cognos Analytics.
2. **Close** the browser to end the session.



Troubleshooting

Users may contact Ashley Wiesemann (wiesemaa@ipfw.edu) with questions specific to this manual.

Feedback on this Document

Questions and feedback specific to this document are welcomed. Please email your comments to wiesemann@ipfw.edu.

Run Report in Background – MY CONTENT OR DEPARTMENTAL FOLDER

Users have the ability to run reports in the background. This allows Cognos to process the reports and send the user an email when the report has completed. It generally shortens the runtime and allows the users to work on other things instead of waiting for the report to render on their desktop.

Rules for using this feature:

- The user must have write access to the folder where the report is saved, commonly, My content or departmental folders
- Users can include other recipients in the email.
- Using report links (default) is the optimal use for security purposes. Consider report content before using the Attach report output option.

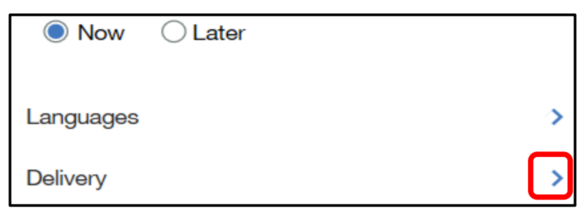
Creating a Background Run Option

1. Navigate to a report within a folder you have write access to save objects.
2. **Right-click** on the report and **Select *Run as***.
3. **Click** on the white circle in the ***gray cylinder***.

A check mark appears and the object turns blue.

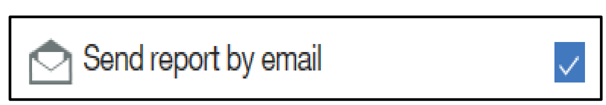
4. **Locate** the ***Advanced*** option further down the form and **click**.

Selecting *Later* will open an option for date and one for time to set a future run.

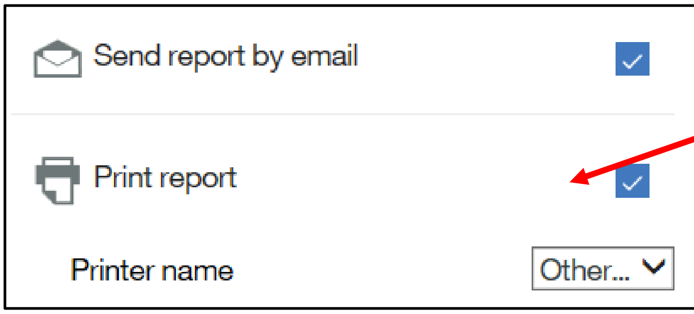


5. For this exercise, **select *Now***, then **open** the ***Delivery arrow.***

6. **Click *Send the report by email.***



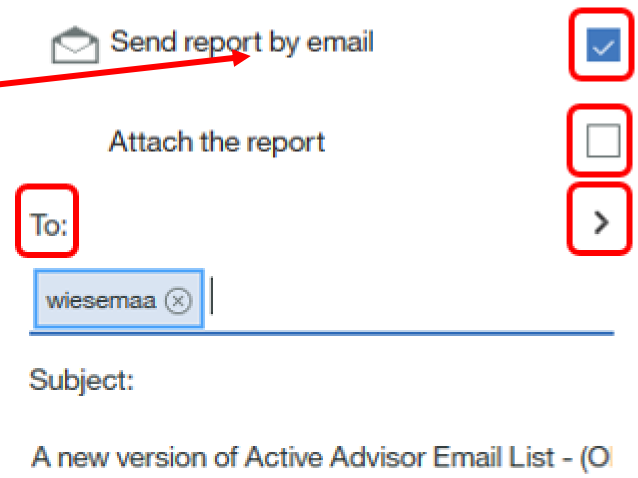
CAUTION Users may see the Print report option checked. It **must** be unchecked for the report to run!



UNCHECK

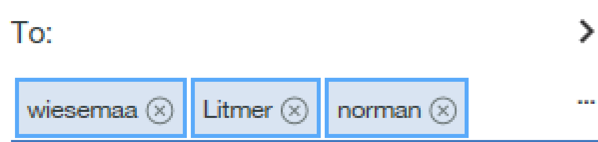
Print report MUST be unchecked to run.

7. **Select *Attach the report*** if you want the version included as an attachment to the email. **(*Please consider report content and security when using this feature).***

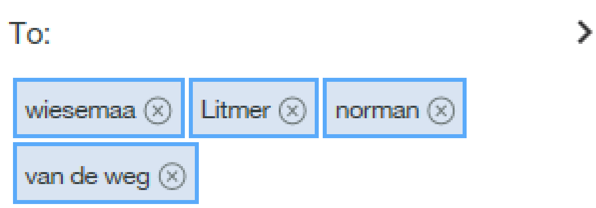


8. To add other users, **click to the right** of your **ID.**
9. Begin typing another user's **FULL PURDUE EMAIL** address.
   ***Note**: User emails must be used here. Be sure to look them up before adding them to the list.*

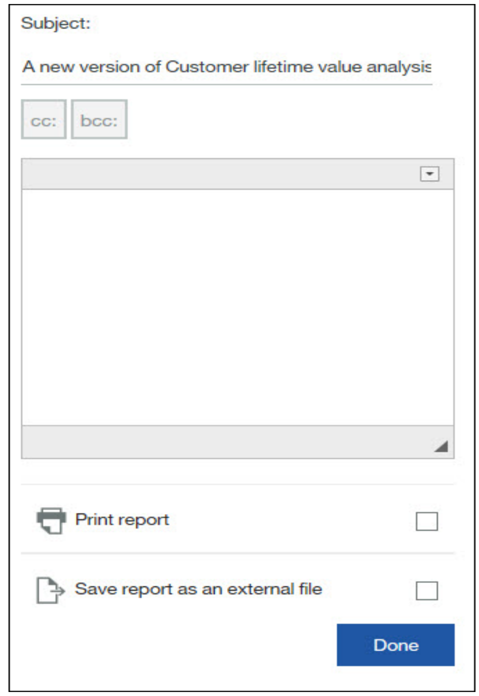
Click the  to remove users from the To: block.



Click the elipsees to see all users added.



10. **Add** a message to the email, if desired.



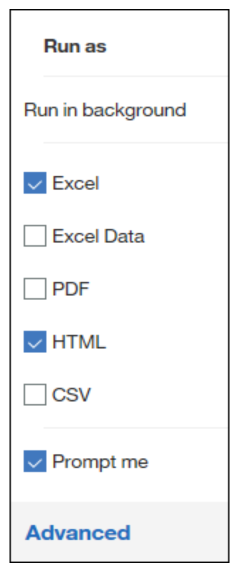
- Including a link is the most secure delivery option. Leave checked. ***Recipients must have a Cognos license to open the link in the email.***

- **DO NOT SELECT Print report** (not a working feature)

- **<u>DO NOT CHECK</u>** ***Save report as an external file*** as this requires a special set up. You must have made previous arrangements for this delivery type with the BICC.

11. **Click *Done*** to return to the ***Run as*** form.

12. ***Select*** report output formats as desired.



13. **Ensure *Prompt me*** is checked.

14. **Click *Run*** to process the report to email.

Run Report in Background – USER DOES NOT HAVE WRITE ACCESS

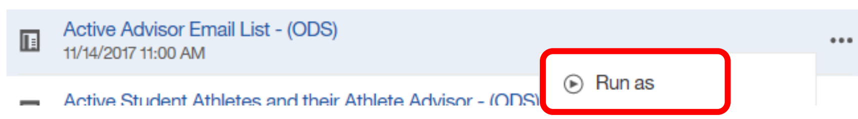
Users have the ability to run reports in the background. This allows Cognos to process the reports and send the user an email when the report has completed. It generally shortens the runtime and allows the users to work on other things instead of waiting for the report to render on their desktop.

Rules for using this feature:

- Users do not have write access to the folder where the report is saved, commonly Standard Report folders, reports **not in** My content or departmental folders.
- Users can include other recipients in the email.
- Users can only use Attach the report option. Consider the report content before using this feature.

Creating a Background Run Option

1. **Right-click** on the report name and **Select *Run as***.



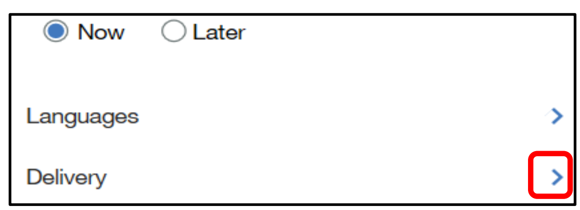
2. **Select *Run in background***.
3. **Click** on the white circle in the ***gray cylinder***.

A check mark appears and the object turns blue.

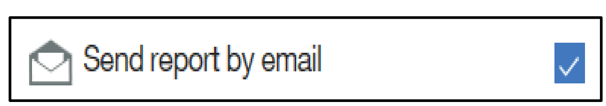
4. **Select** desired report output type(s).
5. **Locate** the ***Advanced*** option further down the form and **click**.

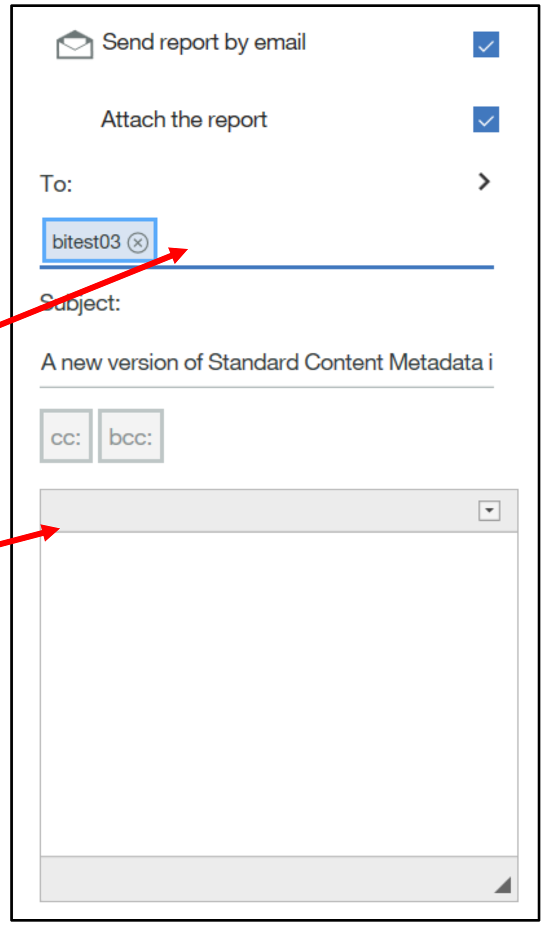
Selecting *Later* will open an option for date and one for time to set a future run.

6. For this exercise, **select *Now*** (default value), then **open** the ***Delivery arrow.***



7. **Click *Send the report by email.***





The form opens with your email address inserted and defaults to ***Attach the report*** option already checked.

8. To add other users, **click to the right** of your **ID.**
9. **Begin typing** another user's **FULL IPFW EMAIL** address. ***Note***: ***User emails must be used here. Be sure to look them up before adding them to the list.***

Click the  to remove users from the To: block.

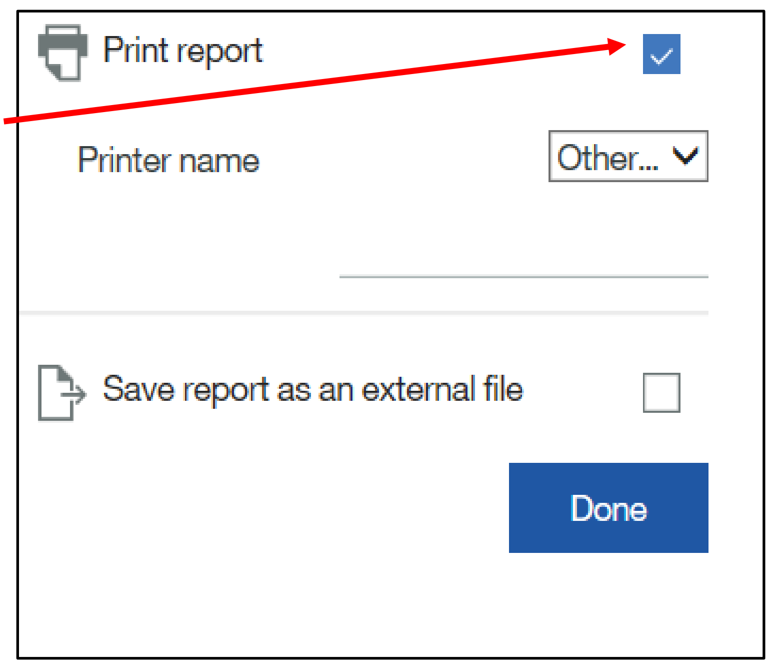
Click the elipsees to see all users added.

10. **Add** a message to the email, if desired.

11. **Scroll down** to the bottom of the form.

12. **Uncheck** the ***Print report*** box.

Users will see the Print report option checked. It **must** be unchecked for the report to run!



<u>DO NOT CHECK</u> ***Save report as an external file*** as this requires a special set up. You must have made previous arrangements for this delivery type with the BICC.

13. **Click *Done*** to return to the ***Run as*** form.

14. ***Select*** report output formats as desired.

15. **Verify *Prompt me*** is checked.

16. **Click *Run*** to process the report to email.